

**DATE :**       **June 28, 2002**

**LETTER TO:** Regional Office (RO) Managed Care Staff

**FROM:**       Gary A. Bailey, Director

**SUBJECT:**     Rollout of Plan Benefit Package (PBP) Processing in MCCOY – **ACTION**

The President signed the Bioterrorism Preparedness Act of 2001 on June 21. This Act delayed the implementation of the Lock-in Provisions of the Balanced Budget Act (BBA) until 2005. These provisions had mandated specific timeframes when Medicare beneficiaries could enroll, disenroll and/or elect a plan. This new legislation allows beneficiaries to continue to enroll, disenroll or elect a plan on a monthly basis.

We had planned to begin the rollout of PBP functionality in MCCOY by June 1. However, the lock-in editing and related data fields that were coded must all now be removed. The purpose of this letter is to describe what initial functionality will be available.

**May 21 – July 12, 2002**

PBP processing will not be implemented into the managed care system until just before the August 1 payment run. This means that RO staff will be unable to input online PBP elections or corrections if they are requested by members or by Medicare + Choice Organizations (M+COs). To limit the impact on RO work, all online enrollments that are input between May 21 and July 12 will have the default PBP #s for the M+COs automatically added.

The M+COs have been instructed to review their Monthly Membership Reports (MMRs) and to correct PBP #s when necessary. If the default PBP # assigned to these enrollments is not correct, the M+CO is to submit a Transaction type 71 (with the Correction Flag set to X) with the correct PBP #. The list of default PBP #s for each M+CO is attached for your information.

**July 18, 2002**

On and after this date, RO staff will be able to update the PBP # in MCCOY. Five screens will be changed in the initial implementation. See attached screen layouts.

- View Enrollment
- Enrollment/Disenrollment Changes
- Verify Enrollment Changes
- View Snapshot
- New Beneficiary Enrollment

During the second phase, three additional screens will be revised to contain PBP information. We are hoping to have them ready by January 1, 2003.

- View Beneficiary History
- View Audit History
- Group Enrollment Changes

### **VIEW ENROLLMENT**

PBP periods are shown for each enrollment beginning from 6/1/2002. (June 1, 2002 is the start-up date for recording PBP elections.) The periods are displayed from the most recent to the oldest. For each M+CO enrollment, the PBP elections begin at the line marked ENRL and progress through time. The line containing the PBP # is the election start date and the next line up with no PBP # shown is the election end date. The dates will be contiguous as long as the member remains in the M+CO. Obviously, when the PBP periods end, the M+CO enrollment period ends.

### **ENROLLMENT/DISENROLLMENT CHANGES**

You will be able to update PBP information from this screen in the same way that you update M+CO enrollment information. As on the View Enrollment screen, the PBP periods are displayed beginning 6/1/2002 from the most recent to the oldest. The election begin and end dates are next to each other and are contiguous throughout the M+CO enrollment period. When updating PBP information, the following rules will apply.

- A PBP election start date cannot precede 6/1/2002.
- COM MTH, if needed, is input at the first PBP period level, which is at the point of enrollment into the M+CO.
- DIS RSN is input at the final PBP period; upon disenrollment from the M+CO.
- FC is the Force Code column. It had to be collapsed to fit on the screen. By placing the cursor on this field and pressing F6, you can see the valid values. Like the COM MTH, if needed, is input at the first PBP period level, which is at the point of enrollment into the M+CO.

- Cancellations are performed the same way as they are now; by inputting zeroes on the start and end dates of the appropriate periods. In the initial implementation, cancellation of an M+CO enrollment period will require you to cancel each associated PBP election period separately. At a later date, such cancellations will be able to be performed by inputting the number of the M+CO enrollment period in a field at the bottom of the screen and pressing F2.
- New enrollments and/or new PBP elections are input at the top of the screen at the NEW line.
- Changes to existing periods are input on the existing PBP period lines. This is true even if the member is being disenrolled. The disenrollment date is input at the last open PBP period. MCCOY will automatically populate the M+CO disenrollment date.

### **VERIFY ENROLLMENT CHANGES**

This screen will look like the Enrollment/Disenrollment Changes screen. You will be prompted to verify your changes by pressing F2.

### **VIEW SNAPSHOT**

In order to fit up to 3 lines of PBP information on this screen, the State, County, Zip Code and Date of Death fields have been repositioned next to the Address fields. A 'page down' option will be added at a later date to allow additional PBP periods to be displayed. The PBP periods are listed from most recent to the oldest.

### **NEW BENEFICIARY ENROLLMENT**

The PBP field has been added to this screen. While it is not being stored on the EDB, it is required for managed care enrollment processing.

### **Contact Information**

If you have questions about the material in this letter, please contact the Central Office staff person assigned to your region.

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#### Attachments

## DEFAULT PBPs FOR M+COs

Contract Number   Plan Benefit Package

H0150	001
H0151	001
H0154	001
H0302	001
H0303	015
H0307	004
H0350	001
H0351	007
H0354	001
H0504	015
H0523	022
H0524	008
H0532	002
H0538	001
H0543	001
H0545	001
H0562	010
H0564	004
H0566	003
H0571	001
H0609	007
H0619	001
H0630	004
H0752	002
H0755	001
H0802	001
H0954	004
H1013	011
H1016	001
H1019	002
H1026	004
H1027	003
H1032	009
H1034	001
H1035	002
H1036	011
H1040	001
H1076	001
H1078	001
H1080	004
H1099	001
H1106	001
H1168	004
H1170	002
H1230	001
H1350	001
H1406	006
H1407	001

H1463	001
H1468	004
H1506	001
H1803	001
H1849	003
H1951	001
H1958	001
H1961	001
H2108	001
H2204	007
H2206	003
H2256	002
H2261	005
H2312	004
H2317	001
H2353	001
H2354	008
H2403	002
H2406	001
H2459	002
H2502	001
H2649	004
H2654	004
H2663	001
H2666	004
H2667	001
H2672	001
H2802	001
H2931	006
H2949	002
H2960	004
H2961	002
H3107	001
H3152	029
H3154	001
H3156	021
H3164	001
H3204	002
H3251	002
H3255	005
H3305	001
H3307	002
H3312	002
H3330	003
H3351	001
H3359	001
H3361	010
H3362	003
H3366	008
H3370	004
H3379	001
H3384	014
H3387	005
H3388	001
H3449	005
H3455	004

H3456	001
H3607	001
H3610	001
H3653	004
H3655	002
H3657	001
H3659	007
H3660	003
H3664	001
H3668	005
H3672	001
H3673	004
H3749	001
H3755	001
H3805	001
H3856	010
H3864	001
H3907	010
H3909	001
H3911	801
H3931	039
H3949	002
H3952	019
H3954	003
H3957	003
H3959	001
H3962	001
H3964	001
H3972	001
H4003	001
H4102	001
H4152	005
H4349	002
H4454	006
H4456	003
H4461	004
H4506	001
H4510	006
H4513	001
H4590	012
H5005	001
H5006	001
H5050	001
H5104	801
H5105	801
H5149	001
H5151	002
H5253	004
H5262	001
H9001	001
H9003	001
H9005	004
H9011	003
H9016	002
H9047	001
H9049	001

H9101	001
H9103	001
H9104	006



## View Enrollment Screen

```
|---+---1---+---2---+---3---+---4---+---5---+---6---+---7---+
+---8
```

03/20/2005 (USER) VIEW ENROLLMENT (1 OF 1)

1

999-99-9999-A Bermudez, Belinda K DATE OF BIRTH: 11/28/1908 SEX: F

	CONTRACT		DATE	PBP	SOURCE	REASON	RA
1	H9999		06/01/2004	014	H9999		
			05/31/2004				
			04/01/2004	401	DPOS		Y
			03/31/2004				
	H9999	ENRL	03/01/2004	101	H9999		
2	H8888	DSRL	02/28/2004		H9999	ENR IN OTHER PLAN	
			01/01/2003	014	H8888		
			12/31/2002		H8888		
			06/01/2002	401	H8888		
			05/31/2002		H8888		
	H8888	ENRL	05/01/2001		H8888		
3	H7777	DSRL	06/30/2000		AUTOD	CONTR TERMD - PLAN	
	H7777	ENRL	08/01/1999		H7777		

...

==> \_\_\_\_\_ PF1=HELP PF3=QUIT PF7=PAGE- PF8=PAGE+  
PF9=PRINT PF12=MENU

# Enrollment Disenrollment Changes Screen

-----1-----2-----3-----4-----5-----6-----7-----

8

03/21/2004 (USER) ENROLLMENT DISENROLLMENT CHANGES (1 OF 1) 1.7  
 999-99-9999-A Antonelli, Cecilia R DATE OF BIRTH: 10/08/1901 SEX: F

	CONTR PBP	ENROLL	DISENR	UPDATE START DATE	UPDATE END DATE	DIS RSN	COM MTH	F C
NEW	----- CONTR#	--- PBP#		MM / DD / YYYY	MM / DD / YYYY	--	--	
#1	H9999	01/2000						
	081	01/2004		MM / DD / YYYY	MM / DD / YYYY	--		
	001	06/2003	12/2003	MM / DD / YYYY	MM / DD / YYYY			
	107	06/2002	05/2003	MM / DD / YYYY	MM / DD / YYYY			
		01/2000	05/2002	MM / DD / YYYY	MM / DD / YYYY			--
#2	H9999	11/1998	11/1999	MM / DD / YYYY	MM / DD / YYYY	11	--	
#3	H8888	11/1997	10/1998	MM / DD / YYYY	MM / DD / YYYY	13	--	
#4	H7777	11/1996	02/1997	MM / DD / YYYY	MM / DD / YYYY	11	--	
#5	H6666	11/1995	02/1996	MM / DD / YYYY	MM / DD / YYYY	11	--	

-- <== TO CANCEL ENTIRE MCO ENROLLMENT PERIOD, ENTER PERIOD NUMBER.

==> ----- PF1=HELP PF2=UPDATE PF3=QUIT PF4=CLEAR PF5=ADJ OVRIDE  
 PF6=CODES PF7=PAGE- PF8=PAGE+ PF10=ERROR- PF11=ERROR+ PF12=MENU

# Verify Enrollment Changes Screen

```

-----1-----2-----3-----4-----5-----6-----7-----8
03/21/2004      (USER)      VERIFY ENROLLMENT CHANGES  (MCCOY)      1.7
999-99-9999-A  Antonelli, Cecilia R      DATE OF BIRTH: 10/08/1901  SEX: F

CONTRACT  ENROLL      DISENROLL      SCC      SCC      PRIOR
PBP        DATE        DATE              EXEMPTION  MTHS      CHANGES  FORCED

   H9999    01/01/00              05520
   081      01/01/04              *
   001      06/01/03      12/31/03
   107      06/01/02      05/31/03
           01/01/00      05/31/02
   H9999    11/01/98      11/30/99      05520
   H8888    11/01/97      10/31/98      05520
   H7777    11/01/96      02/28/97      05520
   H6666    11/01/95      02/29/96      05520

...

      PRESS PF2 TO UPDATE OR PF3 TO RETURN TO UPDATE SCREEN
==> _____ PF1=HELP      PF2=UPDATE      PF3=QUIT
      PF7 PAGE      PF8 PAGE      PF9 PAGE

```

## View Snapshot Screen

```
|---+---1---+---2---+---3---+---4---+---5---+---6---+---7---+---|
8
03/20/2002                (USER)  VIEW SNAPSHOT  (MCCOY)                1.4
PROFILE FOR:  03 / 20 / 2002      (** CURRENT DATA **)
CURRENT
999-99-9999-C1 Thompson, Michael    DATE OF BIRTH: 06/03/1970  SEX: M

STATE:  99                      ADDRESS:  MICHAEL THOMPSON
COUNTY: 999                    HELEN RAILING FOR
ZIP:     99999                  MICHAEL S THOMPSON
DATE OF DEATH:  MM/DD/YYYY      1000 SOMEPLACE ST
                                   APT 999
                                   SOMECITY XX 99999-9999

CONTRACT:  H9999 RISK                START          END          OPTION
THE MEDICAL PLAN, INC              03/01/2000
PBP ELECTION:                      001  01/01/2004
                                   207  01/01/2003  12/31/2003
                                   303  06/01/2002  12/31/2002

ENTITLEMENT:  PART A:              02/01/1992          E
               PART B:              02/01/1992          Y

HEALTH STATUSES:
      CHANGE PROFILE DATE AND PRESS 'ENTER' TO VIEW HISTORICAL DATA
==> _____ PF1=HELP    PF3=QUIT    PF6=CODES    PF9=PRINT    PF12=MENU
```

```

/-----1-----2-----3-----4-----5-----6-----7-----8
1| 05/09/2002          (XXXX)  NEW BENEFICIARY ENROLLMENT  )          1
2|
3|
4| 22222222A  JONES, A XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
5|
6|
7| 1  CONTRACT: _____ PBP: _____
8|          ENROLL DATE: _____          DISENROLL DATE: _____
9|  PRIOR COMMERCIAL MTHS: _____          DISENROLL REASON: _____
0|
1|
2|
3| 2  CONTRACT: _____ PBP: _____
4|          ENROLL DATE: _____          DISENROLL DATE: _____
5|  PRIOR COMMERCIAL MTHS: _____          DISENROLL REASON: _____
6|
7|
      THE BENEFICIARY'S DATA MUST BE RETRIEVED FROM EDB.
0|  CHECK BACK WITH GHP LATER TO SEE IF THE DATA HAS BEEN
RETURNED.
1|
2|          MAKE CHANGES AND PRESS PF2 TO TRANSMIT REQUEST
3| ==> _____ PF1=HELP          PF2=TRANSMIT          PF3=QUIT
4|          PF4=CLEAR          PF6=CODES          PF12=MAIN
MENU

```



